

ICI 1989 Annual Survey Results

Presented By INPUT

R. Dennis Wayson
Vice President



Overview

- Study demographics
- Service provided
- User support organizations
- Budgeting and financing
- User requirements and services
- Characteristics of the environment
- Trends and issues

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Notes:

UMKT-DRW-2



Demographics

- Surveys compiled To date: 48
- Average number of employees: 17,700
- With a company average of:
 - 1500 microcomputers
 - 2700 terminals per

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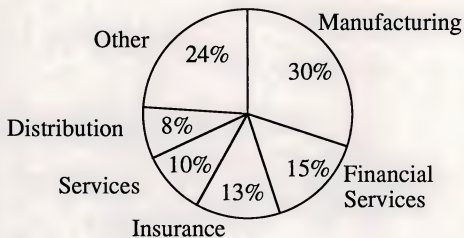
Notes:

UMKT-DRW-3



Demographics

Industry Segmentation



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Notes:

UMKT-DRW-4



Area of Service

- 78% provided service corporate-wide
- 47% were unique service providers
- 70% reporting at corporate level to IS
- 2,200 customers/group on average

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Notes:

UMKT-DRW-5



Service Penetration

Device	Supported	Penetration
Personal computers	516 (Avg)	34%
Terminals	724 (Avg)	27%

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Notes:

UMKT-DRW-6



Organization/Objectives

- Average age of the organizations: 6 Years
- Average number of employees: 13
- 31% utilize part-time employees
- 62% performed other activities (Data mgt., Programming, Other IS)

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Notes:

UMKT-DRW-7



Objectives

Ranked by frequency

- Facilitate improved productivity
- Establish and promote standards
- Provide training, support and service
- Consult on data and applications

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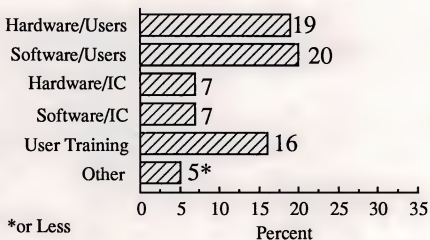
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UMKT-DRW-8



Organization/Budgets

Average Budget Size: \$700,000



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Notes:

UMKT-DRW-9



Futures

Increased role in...

- Executive support systems
- Production applications
- Integration
- Data (Internal/External)

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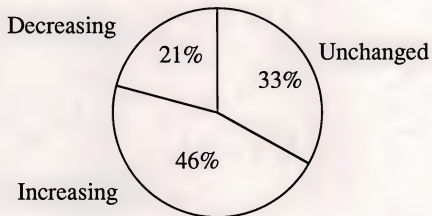
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UMKT-DRW-10



Futures

Changes in Size Group



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Notes:

UMKT-DRW-11



Futures

Major Issues - Next 3 Years

Integration	Data, Networks, Applications
Technology	386, OS/2, LANS, Relational DB
Support	Power users/ Production apps.
Security	Data, Network
Decentralization	30% Now Experiencing

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Notes:

UMKT-DRW-12a,b



Current User Requirements

Percentage	Requirement
80 - 100%	E-Mail Word processing Spreadsheets Presentation graphics Local data bases (internal)

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Notes:

UMKT-DRW-13



Current User Requirements

Percentage	Requirement
50 - 80%	Desktop publishing Databases (External) General office automation 4GL applications

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Notes:

UMKT-DRW-14



Current User Requirements

Percentage	Requirement
15 - 50%	Expert systems CAD/CAM CASE

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Notes:



Current Services Provided

80 - 90 % Provide:

- Hardware/software evaluation
- Hardware/software diagnosis
- Hardware/software consultation
- Hardware/software standards

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Notes:



Current Services Provided

60 - 80 % Provide:

- Hotline & training services
- Hardware/software installation
- Hardware/software purchasing
- Loaner and design services

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Notes:

UMKT-DRW-17



Current Services Provided

40 - 60 % Provide:

- User newsletter & councils
- Data extracts
- External data access
- Moving & maintenance services

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Notes:



Platforms Supported

Overall Sample Characteristics

Parameter	Statistic
Total PCs	28,466
Total Apples	1,238
Total Workstations	40
Total Minis	556
Total Mainframes	69

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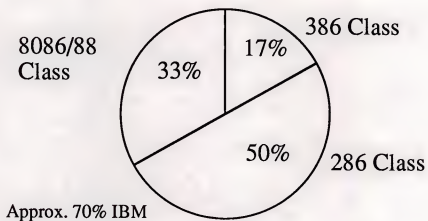
Notes:

UMKT-DRW-19



Platforms Supported

Makeup of PC Sample



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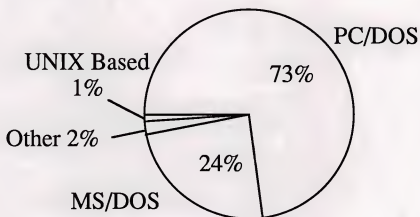
Notes:

UMKT-DRW-20



Platforms Supported

PC Operating System Distribution



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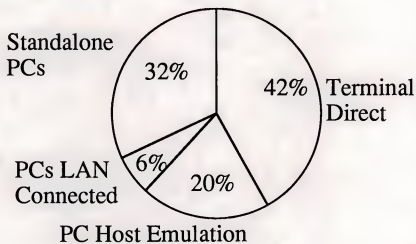
Notes:

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Platforms Supported

Workstation Connectivity



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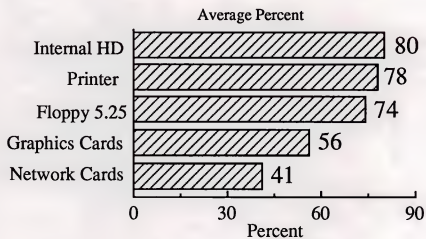
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Platforms Supported

Primary PC Add-Ons



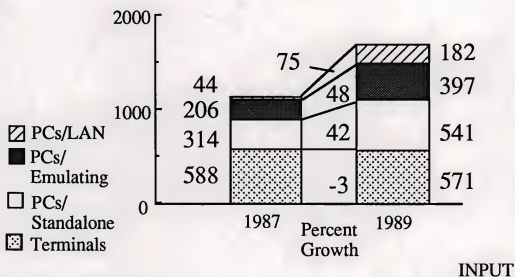
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Notes:

UMKT-DRW-23



Workstation Platform Growth 1987-1989



Notes:

UMKT-DRW-24



Key Issues—Platforms

- Emergence of UNIX
- Key decisions involving OS/2
- Cooperative processing
- Distributed data base management

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Notes:

UMKT-DRW-25



Platform—PC Software

Function	Package (Rank Order)
Spreadsheet	Lotus, Excel, Symphony
Word Processing	WordPerfect, Displaywrite, WORD
Databases	dBase, Paradox, RBase
Communications	Crosstalk, Smartcom

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Notes:

UMKT-DRW-26



Trends & Issues

Power Users

- 92% of respondents support power users
- 28% report special service requirements
- 90% utilize power users in user departments

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Notes:

UMKT-DRW-27



Trends & Issues

Power Users

- Perceived as both resource and threat
- Offer opportunities
 - Participate in evaluations
 - Co-operative in support activity
 - Utilize in pilots & rollouts

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Notes:

UMKT-DRW-28



Trends & Issues

Decentralization of IS

- 60% observe decentralization of applications development
- 70% believe this will impact end user computing

Not necessary negative, providing:

- Infrastructure remains centrally managed
- Minimum standards, & security in place

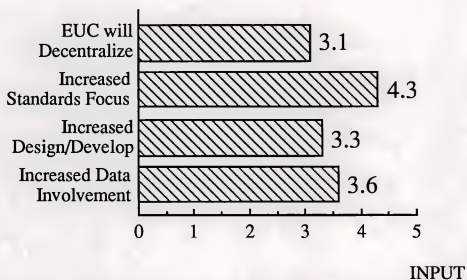
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UMKT-DRW-29a,b



Respondents Views—Decentralization



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UMKT-DRW-30



Impacts of Decentralization on EUC

- Higher level technical requirements
- Greater emphasis on standards/connectivity
- Demand for higher level project mgt. skills
- Focus on applications and data

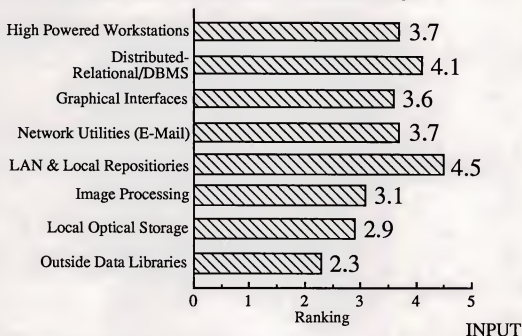
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Notes:

UMKT-DRW-31



Impacts of New Technologies



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UMKT-DRW-32a,b



Closing Thoughts

- EUC organizations will face new challenges
 - Higher level technical skills
 - Greater management capability
 - Increased business knowledge
- Technology will provide both opportunities and threats

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Notes:



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Futures

SUBTITLE

← Increased role in...

- Executive support systems
- Production applications
- Integration
- Data (Internal/External)

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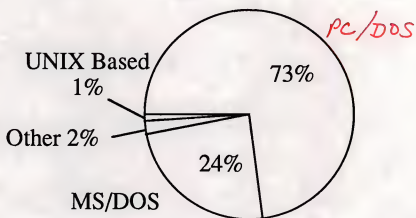
Notes:

UMKT-DRW-10



Platforms Supported

PC Operating System Distribution



INPUT

Notes:

UMKT-DRW-21



1
Do all
as shown

ICI 1989 ANNUAL SURVEY RESULTS

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OVERVIEW

- Study Demographics
- Service Provided
- User Support Organizations
- Budgeting and Financing
- User Requirements and Services
- Characteristics of the Environment
- Trends and Issues



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DEMOGRAPHICS

Surveys Compiled To Date: 48

Average Number of Employees: 17,700

CO. & PART
~~WITH AN~~ AVERAGE OF:

1500 Microcomputers Per Company

2700 Terminals Per Company



AREA OF SERVICE

- 78% Provided Service Corporate-Wide
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- 70% Reporting At Corporate Level to IS
- 2,200 Customers/Group on (Average)



ORGANIZATION/OBJECTIVES

- Average Age of the Organizations: 6 Years
- Average Number of Employees: 13
- 31% Utilize Part Time Employees
- 62% Performed Other Activities
(Data Mgt., Programming, Other IS)



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OBJECTIVES
RANKED BY FREQUENCY

- Facilitate Improved Productivity
- Establish and Promote Standards
- Provide Training, Support and Service
- Consult on Data and Applications



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FUTURES

INCREASED ROLE IN...

- **Executive Support Systems**
- **Production Applications**
- **Integration**
- **Data (Internal/External)**



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CURRENT SERVICES PROVIDED

80 - 90 % PROVIDE:

- **Hardware/Software Evaluation**
- **Hardware/Software Diagnosis**
- **Hardware/Software Consultation**
- **Hardware/Software Standards**



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CURRENT SERVICES PROVIDED

60 - 80 % PROVIDE:

- **Hotline & Training Services**
- **Hardware/Software Installation**
- **Hardware/Software Purchasing**
- **Loaner and Design Services**



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CURRENT SERVICES PROVIDED

40 - 60 % PROVIDE:

- User Newsletter & Councils
- Data Extracts
- External Data Access
- Moving & Maintenance Services



FUTURES
CHANGES IN GROUP SIZE

[Pie Chart With Following Slices]

33% Unchanged
46% Increasing
21% Decreasing




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DEMOGRAPHICS INDUSTRY SEGMENTATION

[Pie Chart With The Following Slices]

30%	Manufacturing
15%	Financial Services
13%	Insurance
10%	Services
8%	Distribution
24%	Other





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PLATFORMS SUPPORTED
MAKEUP OF PC SAMPLE

[Pie Chart With Following Slices]

17% 386 Class
50% 286 Class
33% 8086/88 Class

NOTE: Approximately 70% IBM



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PLATFORMS SUPPORTED
PC OPERATING SYSTEM DISTRIBUTION

[Pie Chart With Following Slices]

73%	PC/DOS
24%	MS/DOS
2%	OTHER
1%	UNIX Based



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PLATFORMS SUPPORTED
WORKSTATION CONNECTIVITY

[Pie Chart With Following Slices]

42%	Terminal Direct	-
20%	PC Host Emulation	-
6%	PCs LAN Connected	-
32%	Standalone PCs	-



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ORGANIZATION/BUDGETS

AVERAGE BUDGET SIZE: \$700,000

[Horizontal Bar Chart, Scale 0-35%

19%	Hardware/Users
20%	Software/Users
7%	Hardware/IC
7%	Hardware/IC
16%	User Training
	Other 5% or Less

Software



PLATFORMS SUPPORTED
PRIMARY PC ADD-ONS, Average %

[Horizontal Bar Chart, Scale 0-90%]

Internal HD	80%
Printer	78%
Floppy 5.25	74%
Graphics Cards	56%
Network Cards	41%

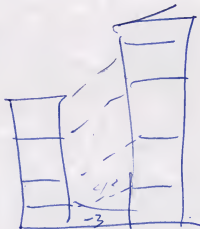


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WORKSTATION PLATFORM GROWTH, 1987-1989*Average Shop*

[Stacked Vertical Bar Chart With Trend Lines]

Label	Left	Right	%Growth
PCs/LAN	44	182	75%
PCs/Emulating	206	397	48%
PCs/Standalone	314	541	42%
Terminals	588	571	-3%





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CURRENT USER REQUIREMENTS

PERCENTAGE	REQUIREMENT
15 - 50%	Expert Systems CAD/CAM CASE



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✓

Do as is

PLATFORMS SUPPORTED
OVERALL SAMPLE CHARACTERISTICS

PARAMETER	STATISTIC
Total PCs	28,466
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SERVICE PENETRATION

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2.12

FUTURES
MAJOR ISSUES - NEXT 3 YEARS

Integration	Data, Networks, Applications
Technology	386, OS/2, LANS, Relational DB
Support	Power Users/Production Apps.
Security	Data, Network
Decentralization	30% Now Experiencing



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Do with box

CURRENT USER REQUIREMENTS

PERCENTAGE	REQUIREMENT
80 - 100%	E-Mail Word Processing Spreadsheets Presentation Graphics Local Data Bases (Internal)



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CURRENT USER REQUIREMENTS

PERCENTAGE	REQUIREMENT
50 - 80%	Desktop Publishing Databases (External) General Office Automation 4GL Applications



